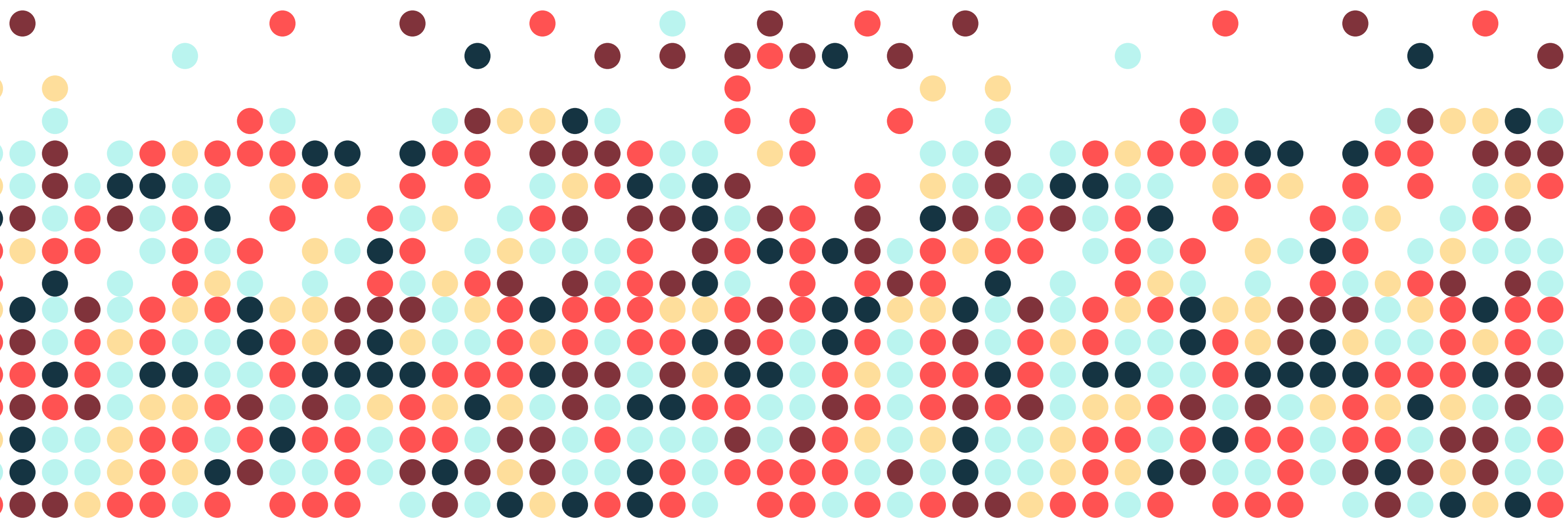




Questions to ask vendors

Everything you need to ask PT software vendors.



Operational Efficiency

Questions to ask vendors

- ☐ What tasks are fully automated vs. partially manual?
- ☐ Can a patient be scheduled, seen, documented, and billed without re-entering the same data?
- ☐ How are task assignments surfaced to the right team members (e.g. eligibility checks, authorization follow-ups)?
- ☐ Does the system support automated reminders for underbooked patients—or does staff need to track this manually?
- ☐ How many clicks does it take to reschedule a visit or book out a plan of care?
- ☐ Can the clinic create unlimited, customizable documentation templates?
- ☐ Can patients complete self-service intake forms that are customizable by location or visit type?
- ☐ Are there tools to streamline plan-of-care scheduling (e.g. visual cues or automated recommendations)?
- ☐ Can front desk, clinicians, and billing work within one unified system or do they rely on separate tools?
- ☐ Is there a waitlist tool? How manual is the process for pulling patients in?
- ☐ Does the system eliminate the need for external spreadsheets or tracking tools?
- ☐ Are patients able to schedule themselves online?
- ☐ Is there an option for patients to check in via kiosk or mobile device?
- ☐ Can I filter reports by date, provider, or location?
- ☐ Can you walk me through how I'd access reports like underbooked patient cases, capacity utilization, units per visit, coding trends, cancellation rates, and visits per discharge?

Additional notes:

Practice Growth

Questions to ask vendors

- ☐ What happens to workflows as we scale—do they break, duplicate, or evolve?
- ☐ How long does it take new staff to learn the system? Can new users be onboarded without a steep learning curve or hours of support tickets?
- ☐ Are permissions, roles, and settings manageable across a growing team?
- ☐ Can you share case studies of practices my size?
- ☐ Is growth limited by your licensing model or backend architecture?
- ☐ How does the system support multi-location operations and reporting?
- ☐ What staff member per clinician ratio does your system support?
- ☐ Do you have reports on the growth metrics your customers have achieved?
- ☐ What does the transition process like when switching to your software? Is there any downtime?
- ☐ What is the cost to add non-clinical users—admin, billers, students, etc.?
- ☐ How can you help me fill my hiring pipeline?

Additional notes:

Onboarding & Support

Questions to ask vendors

- ☐ What does onboarding look like for new users and how long does it take?
- ☐ What's your approach to preserving productivity and revenue during a migration?
- ☐ Are we assigned a dedicated Customer Success Manager and billing support contact?
- ☐ Are the CSMs licensed clinicians? Are the BSMs certified billers?
- ☐ Is your support team U.S.-based or offshore?
- ☐ What are your average response and resolution times for support requests?
- ☐ Can you share examples of how your team proactively helps practices improve workflows?
- ☐ Is your support staff trained in outpatient rehab workflows (billing, scheduling, documentation)?
- ☐ How do you gather customer feedback and how is it incorporated into product improvements?
- ☐ What resources or training materials are available to help our team learn and troubleshoot independently?
- ☐ Can I speak with references who've worked with your support team?
- ☐ If we experience an urgent issue during clinic hours, how quickly can we expect live help?

Additional notes:

Billing

Questions to ask vendors

- ☐ Can our team (or RCM partner) view billing performance in real time?
- ☐ How long does it take to get paid?
- ☐ What tools are in place to reduce denials and automate appeals?
- ☐ Does the system surface missing charges, incomplete notes, or payer-specific errors before claims go out?
- ☐ How easily can we track unresolved claims and monitor financial KPIs?
- ☐ Does the system support both in-house and outsourced billing workflows without duplicate work?
- ☐ Do you offer RCM services? If yes, where is your team based?
- ☐ How have you built AI and automations into your billing platform to support my success?
- ☐ How quickly does your team respond when I need billing support? Are they certified billers? U.S.-based?

Additional notes:

Contracts

Questions to ask vendors

- ☐ Are we locked in for 3+ years?
- ☐ How often do customers renew vs. leave early?
- ☐ How long is the initial term—and what are the renewal terms?
- ☐ Is there flexibility in the contract that allows me to grow or evolve how I want to?
- ☐ Are there hidden fees tied to usage, users, or reporting access?
- ☐ What happens to our data if we decide to switch systems in the future?
- ☐ Do you offer a contract buyout with my current system?
- ☐ If I add on another product, how does that change the terms of my contract?

Additional notes:

Culture

Questions to ask vendors

- ☐ Who's responsible for onboarding—and how is success measured?
- ☐ How can I ensure your team is plugged into the industry?
- ☐ How quickly can support resolve common issues?
- ☐ Is your support team on- or off-shore?
- ☐ Do your users love the product—and the company?
- ☐ Can you provide case studies from practices my size? Referrals?
- ☐ What's your process for collecting and acting on user feedback?
- ☐ When was the company founded?
- ☐ Can I meet some members of the success team?
- ☐ Who makes product roadmap decisions?
- ☐ How do you consider, weigh, and implement product decisions based on customer feedback?
- ☐ What is your company mission?

Additional notes:

Technology & AI

Questions to ask vendors

- ☐ Is this a unified platform with proprietary AI or a combination of acquired tools and plug-ins?
- ☐ Where is AI currently embedded—and what tasks does it actually automate?
- ☐ Do you use AI and automation to keep schedules full?
- ☐ Does the AI ask dynamic questions to personalize intake and surface relevant patient insights?
- ☐ Does AI assist in note taking?
- ☐ Does AI assist in code compliance?
- ☐ Can you show me a live demo of the AI features?
- ☐ How does the system use data to support decision-making in real time?
- ☐ What kind of documentation or predictions does the AI handle today (not just “coming soon”)?
- ☐ What are your policies around AI privacy, patient data use, and transparency?
- ☐ Do you have your own AI Engineering and AI Ethics Team?

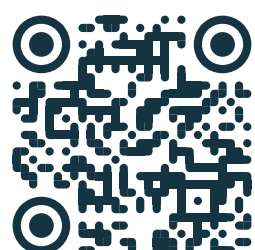
Additional notes:

Our team is ready to answer these questions.

Every question in this checklist is fair game. If your vendor dodges, deflects, or hides behind jargon... that's your answer.

We wouldn't share these if we couldn't back them up ourselves.

Put us on the spot. [Meet with an expert today.](#)



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